



TOOLBOX USER GUIDE

You'll find all the tools you need to grow your business in the All Checked Toolbox

Manage your reputation online.

Generate free and exclusive sales leads.

Drive your website right to the top of Google.

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TOOLBOX

BASICS

1. Setting a Password

To log in to your Toolbox for the first time simply click on the link in the activation email (Fig 1).

You will be invited to set a password (Fig 2). The password should have a mix of upper and lower case letters and at least 1 number and be at least 8 characters long.

Once this information has been entered you will be taken to your Toolbox.

FIG 1. EXAMPLE ACTIVATION EMAIL.

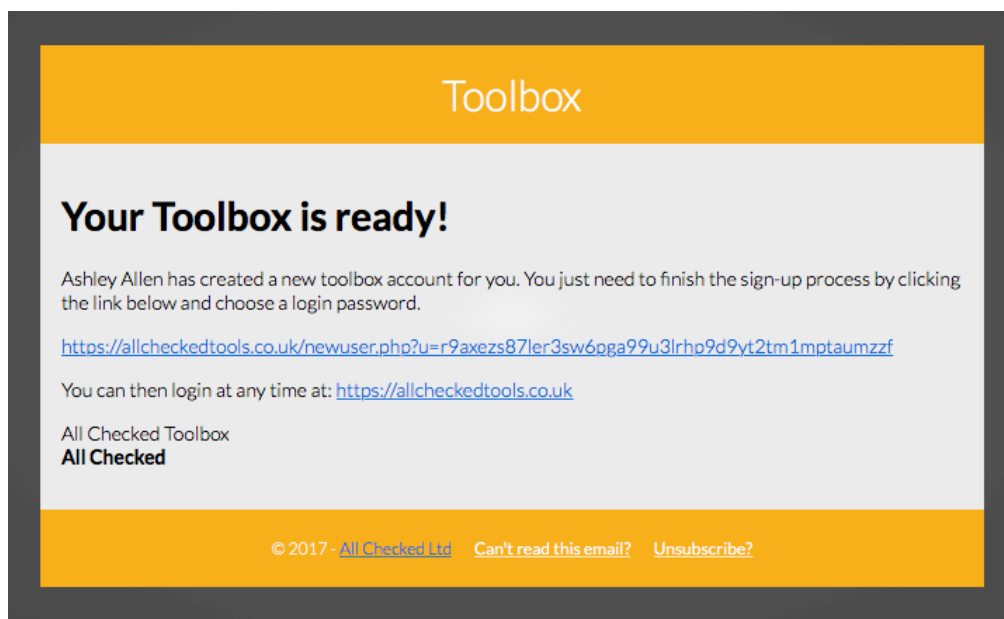
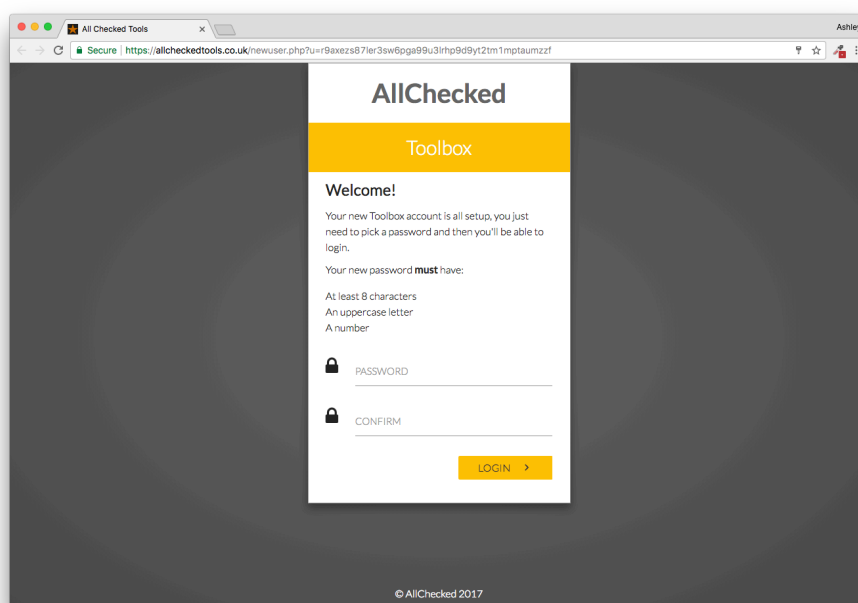


FIG 2. SET PASSWORD



2. Logging in

To log in to your Toolbox visit <http://allcheckedtools.co.uk> (or select the 'Toolbox' link from <http://allchecked.co.uk>)

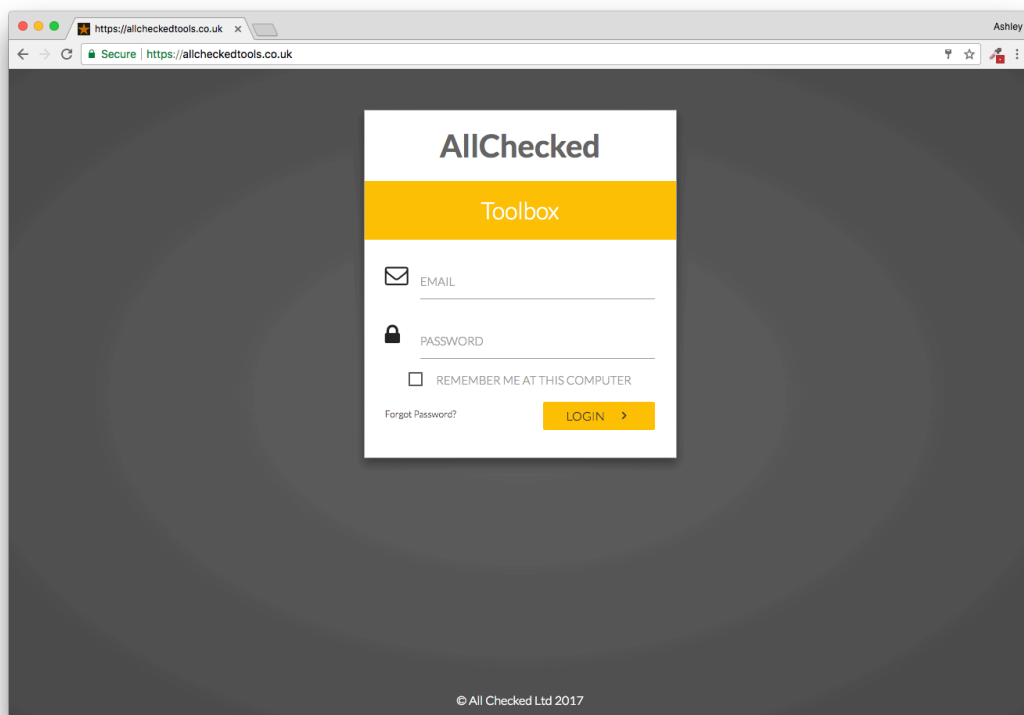
Enter your email address and password that you set (Fig 3). If you have forgotten your password, please click the "Forgot Password" link and follow the on screen instructions.

If you tick the "Remember me at this computer" box, you'll remain logged in at your computer.

If the login box shakes, this is because you've incorrectly entered your email and/or password. Please try entering the information again. Be careful to get your capitalisation right and not to leave a space before entering the text.

When you've successfully logged in you will see your home screen (Fig 4).

FIG 3. LOGIN SCREEN



3. Home Screen

From here you can access all the sales tools you need to grow your business. You can select a tool from the menu on the left column, or by selecting the appropriate label from the main screen.

Your name and company will be displayed at the top of the central column and you'll also find the following useful alerts to the right hand side:

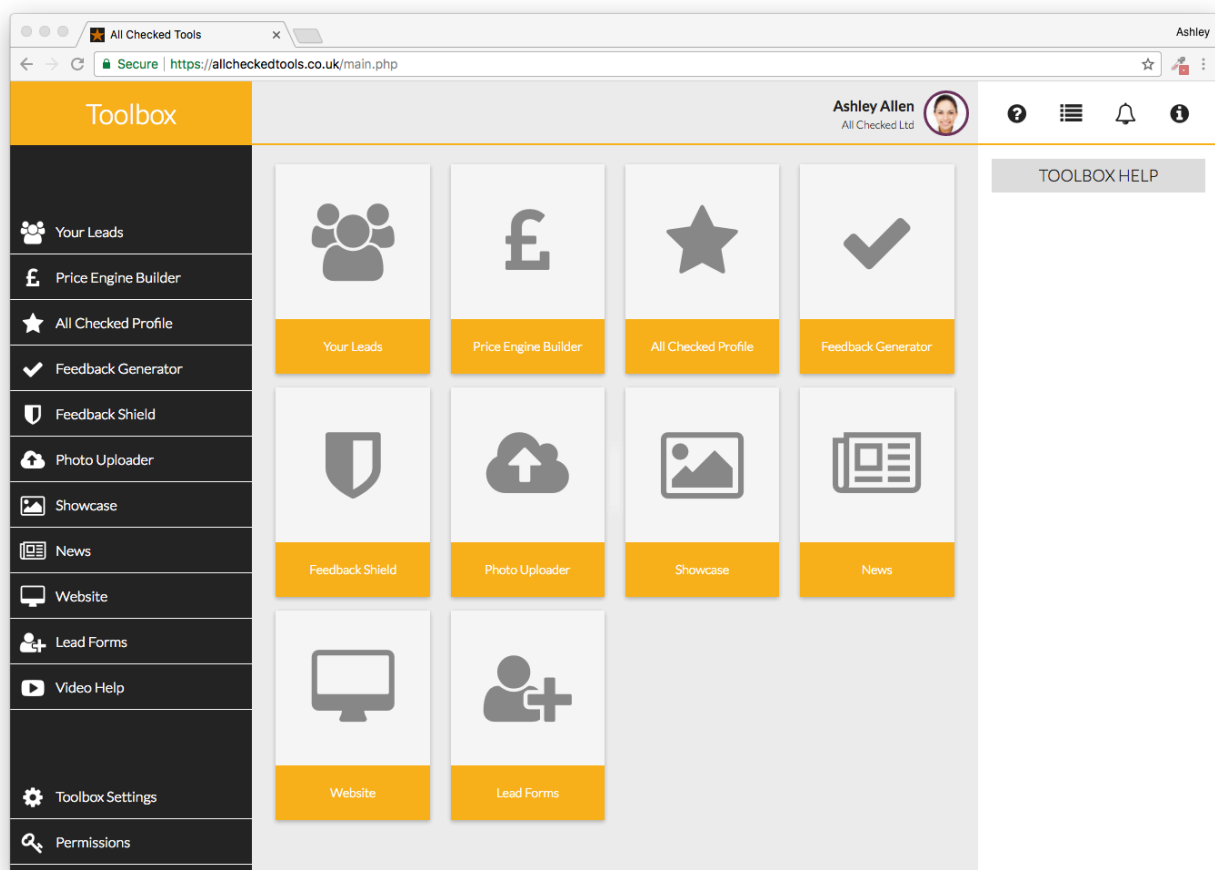
Help - Select Help for information about how to use the tool you've selected.

Tasks - Set a task for a colleague or view tasks colleagues have set for you.

Notifications - Notifications (such as new leads) can be found here.

Reports - If data is displayed on the main screen you can view and generate reports here.

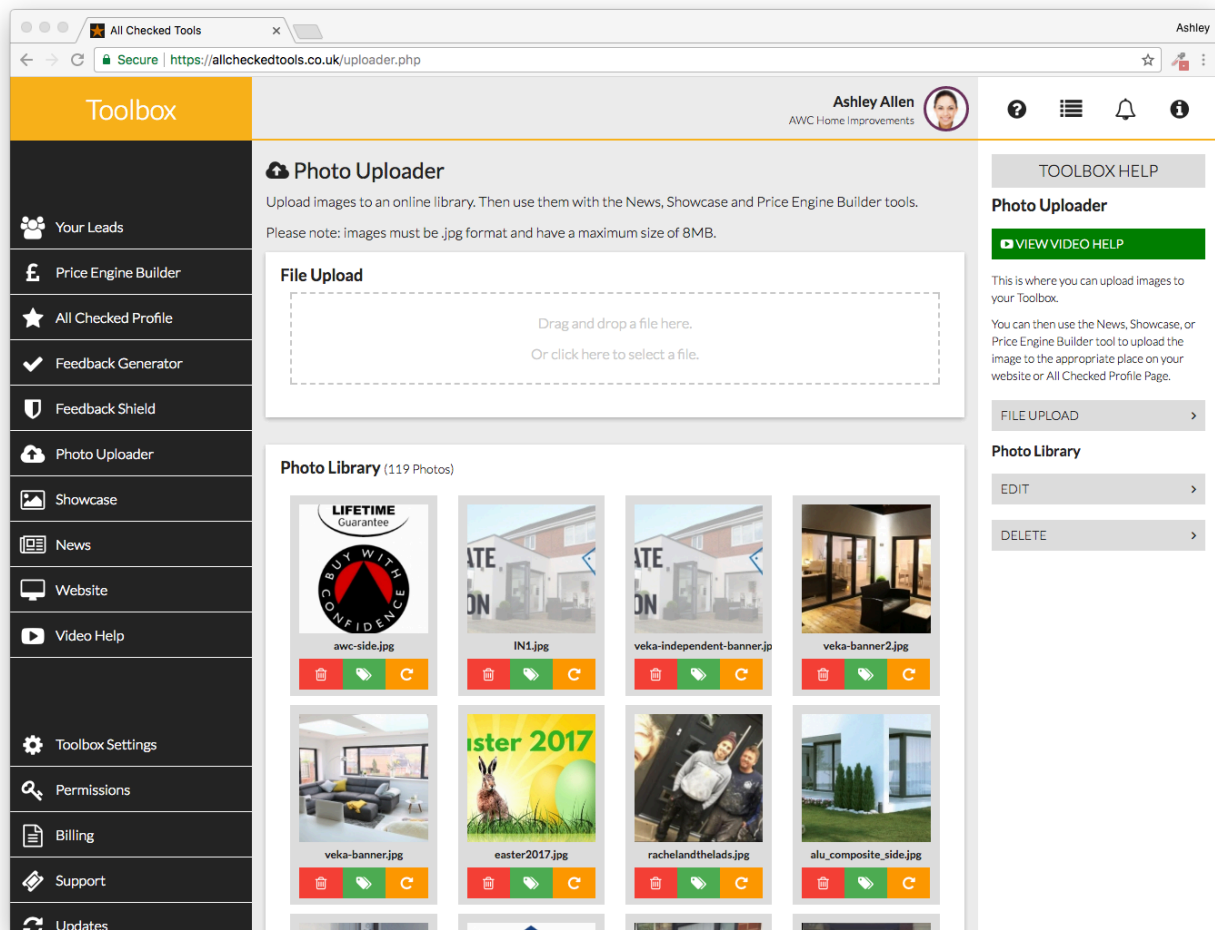
FIG 4. HOME SCREEN



4. Photo Uploader

This is where you can upload images to your Toolbox (Fig 19) for use with these sales tools: All Checked Profile, Price Engine Builder, Showcase, News.

FIG 19. PHOTO UPLOADER



File Upload

Either drag and drop a file from your computer in to the File Upload area or click on the File Upload area to select a file from your computer.

All images must be .jpg format and have a maximum file size of 18MB.

Photo Library

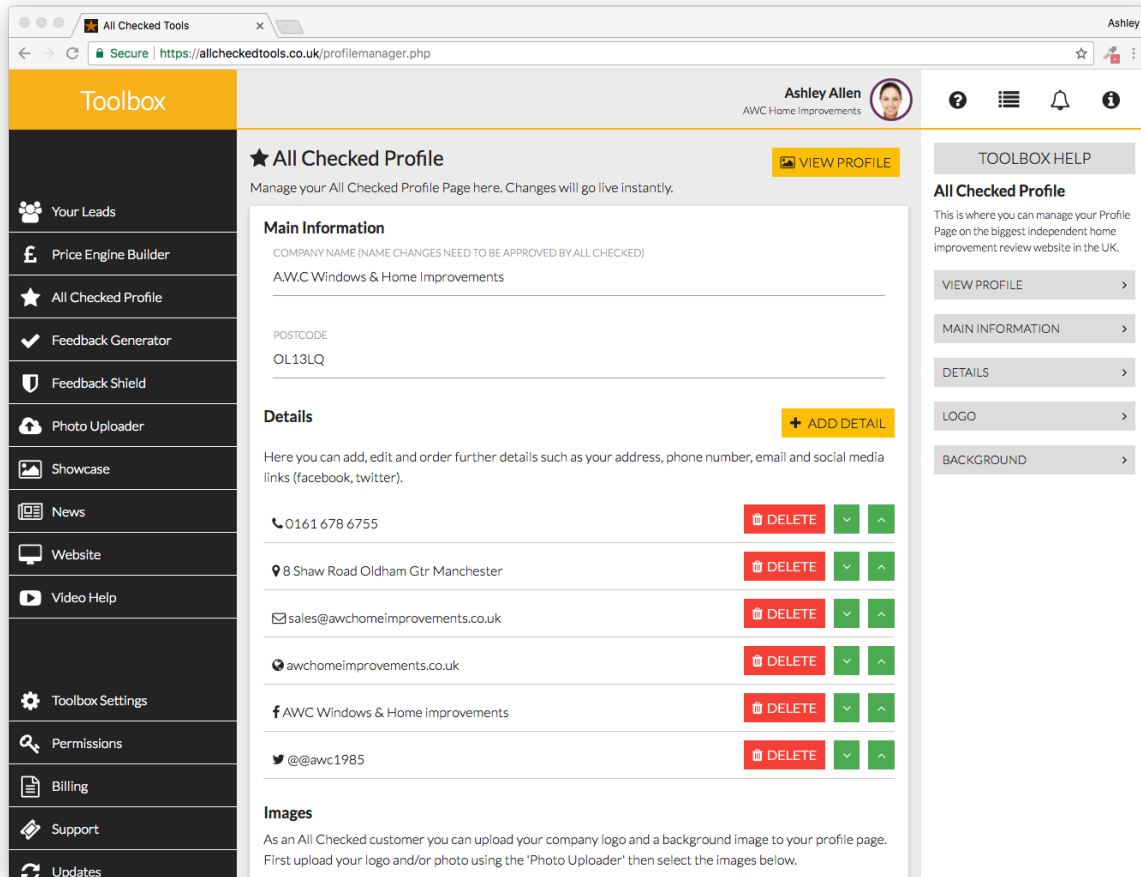
- Select the orange rotate symbol to rotate the image to the correct orientation.
- Select the red dustbin symbol to delete an image.

**MANAGING
YOUR
REPUTATION**

5. All Checked Profile

This is where you can manage your Profile Page on the biggest independent review portal in the UK <http://allchecked.co.uk>

FIG 17. ALL CHECKED PROFILE



View Profile

Select VIEW PROFILE in the top right hand corner to view your All Checked Profile Page in a new tab.

Main Information

Click on each field to change your company name or postcode.

Details

Click on +ADD DETAIL to select a field to add to your Profile Page.

Each field can be deleted using the DELETE button and you can change the order in which they appear by using the green arrows.

Logo

Click on ADD LOGO to select a logo from your Photo Uploader.

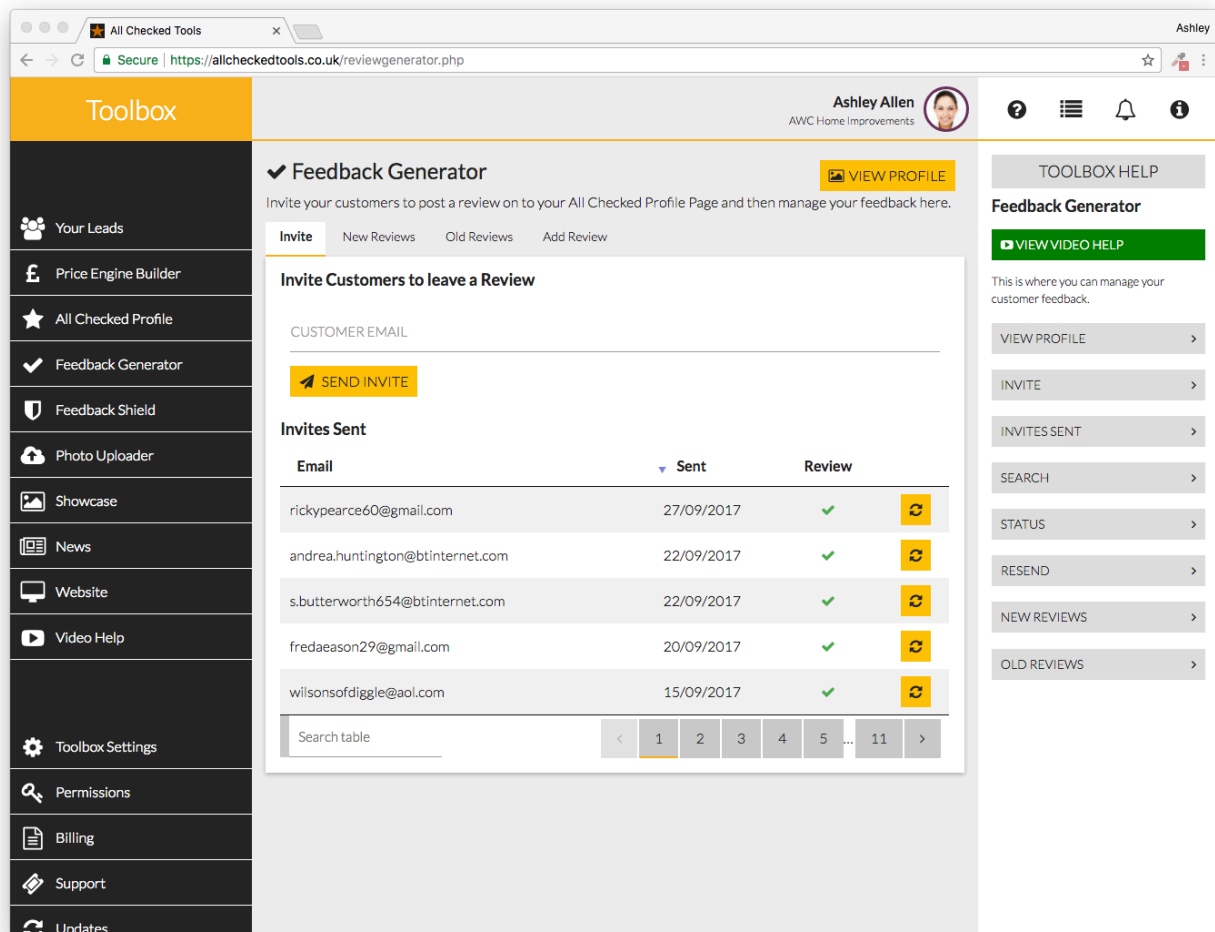
Background

Click on ADD BACKGROUND to select a background from your Photo Uploader.

6. Feedback Generator

This is where you can manage your customer feedback. (Fig 18)

FIG 18. FEEDBACK GENERATOR



View Profile

Select VIEW PROFILE in the top right hand corner to view your All Checked Profile Page in a new tab.

Invite Customers to leave a Review

Enter your customer's email address and click "SEND INVITE" to send an automated feedback request from All Checked. There's no limit to the number of invites you can send.

Invites Sent

This is a list of the invitations that you have sent. They're listed in date order. You can change the order for most recent first to oldest by clicking the heading at the top of the Sent column.

Search

You can search for an invitation by entering all or part of the email address in to the Search field at the bottom of the list.

Status

The Review column will display a red cross to indicate that we're waiting for feedback. This will change to a green tick when feedback has been received.

Resend

Select the yellow resend link to resend the invitation.

New Reviews

This is where you can view your feedback pending moderation.

- Select REPORT to report the review if you're unhappy with it.
- Select RESPOND to add your comments to the review
- Select ACCEPT if you're happy with the review. It will be published and removed from the New Reviews section.

Old reviews

This is where you can view your published feedback.

- Select REPORT to report the review if you're unhappy with it.
- Select RESPOND to add your comments to the review.

7. Feedback Shield

The Feedback Shield will automatically block all negative feedback for investigation before publication. The reviewer will be required to provide proof to substantiate their claim before the review will be considered for publication. All hoax, malicious and unfair feedback will be permanently removed.

Blocked Reviews

These are hoax, malicious or unfair reviews which have been blocked by the Feedback Shield and you won't be required to take any action.

Reviews under investigation

If we block a negative review for investigation and it's from a genuine customer you should contact them to try to resolve any issues privately. If the reviewer provides proof to substantiate their claim and you refuse to act, we'll have no alternative but to re-publish the review.

IMPORTANT:

Use the Feedback Generator tool to add your comments to reviews. It's a great way to:

- show potential customers how much you care.
- mitigate negative feedback.
- have your say to put the record straight.

If the review has already been moderated in the past, select the Old Reviews tab in the Feedback Generator to find it and then select RESPOND to add your comments.

LEAD

GENERATION

8. Your Leads

The Toolbox is packed with powerful lead generating tools and this is your lead management area (Fig 9). All the leads generated via the All Checked website, Price Engine and Lead Forms will be delivered here automatically and completely free of charge.

Use this area to:

- Manage your leads.
- Manually add leads (to manage all your leads in one place).
- Monitor the performance of your sales team.

On the main screen you will see a list of your recent leads. You can sort your leads by status, name, date or source by clicking the headings at the top of each column. Click the heading again to reverse the list (e.g. Z to A instead of A to Z).

Alternatively begin typing a customer's name or address in the Search field at the top of the page to locate them.

FIG 9. YOUR LEADS, LEAD LISTING

The screenshot displays the 'Your Leads' dashboard. The left sidebar contains the 'Toolbox' with various tools like Price Engine Builder, All Checked Profile, Feedback Generator, Feedback Shield, Photo Uploader, Showcase, News, Website, IN: Contacts, IN: Downloads, IN: Marketing Portal, IN: Register Installations, Video Help, and Toolbox Settings. The main area shows a list of leads with columns for Status, Name, Date, and Source. The right sidebar contains summary cards for Status, Your Sources, Delivery Sources, and Users, each showing counts for the last 30 days.

Status	Last 30 days
Fresh	2
New Lead	2
To Be Appointed	16
Appointed	9
Preparing Quote	2
Sold	4
Dead	2
Total	37

Your Sources	Last 30 days
Total	0

Delivery Sources	Last 30 days
Price Engine V3.0	18
Manual	11
Brochure Request	3
Home Quote	5
Total	37

Users	Last 30 days
Michael Griffiths	1
Kieran Mitton	33
Jennifer Crabtree	0
Paul Dumville	0
Christian Harris	0

Add a lead manually:

- Select + ADD LEAD to add a new lead.
- Click on each field to add the customer details.
- Click POSTCODE to enter the postcode and then select FIND ADDRESS to add the address.
- Click SOURCE to select the lead source from the drop down menu.
- Click STATUS to select the enquiry status from the drop down menu.
- Select ADD NEW LEAD to finish.

To view a lead in more detail simply click on it.

FIG 10. YOUR LEADS, LEAD DETAILS

The screenshot displays the 'Your Leads' management interface. The top navigation bar includes the 'Toolbox' menu and user information for 'Ashley Allen'. The main content area shows a lead for 'Mr. Joe wright' with a status of 'To Be Appointed' and a source of 'Price Engine V3.0'. The customer details section includes fields for name, address, email, phone, and IP. A map of the UK is shown at the bottom. The right sidebar contains a 'TOOLBOX HELP' section and a list of navigation links.

Toolbox

Mr. Joe wright 9:46am Tuesday, 3rd October 2017 [Print](#) [Email](#) [Delete](#) [Allocate](#)

Status To Be Appointed **Source** Price Engine V3.0 **Kieran Mitton** Head Office

Customer Details

Mr. **FIRST NAME** Joe **LAST NAME** wright

ADDRESS **CHANGE** **EMAIL**

Phone **PHONE**

IP: 92.26.53.132

DELIVERY SOURCE: PRICE ENGINE V3.0

DID NOT OPT IN FOR FURTHER MARKETING

QUOTED AMOUNT **SOLD AMOUNT**

Map **Satellite**

TOOLBOX HELP

Your Leads

This is your lead management area. All leads generated via a Toolbox mechanism (eg. Price Engine) will be delivered here automatically. Use this area to:

1. Manually add other leads to the database.
2. Manage your leads.
3. Monitor the performance of your sales and marketing department.

ADDING LEADS **NAVIGATION** **CUSTOMER DETAILS** **PRINT / EMAIL LEAD** **ADD NOTES** **STATUS TAB** **LEAD SOURCE TAB** **ASSIGNED TAB** **LEAD CHART**

At the top of the page you'll find the enquirer's name and the date the lead was generated, as well as buttons to print, email, delete or allocate the lead. You can email, or allocate the lead to any other user with permission to view leads.

The header of the lead contains the lead status, source and the user/office it is assigned to. Authorised users may select the edit pencil icon on each tab to change the status, source or assignment of the lead.

When the lead is assigned to a new use they will receive a notification email.

Below the header you'll find the lead details where users can enter or edit details, view additional information and add notes as required. To add a note, simply click the ADD NOTE button.

Lead Settings

To add new (or change) lead statuses and lead sources select the 'Lead Settings' button (see top of Fig 9.).

Here you'll find a Status Chart and Source Chart tab (Fig 11.).

FIG 11. LEAD SETTINGS (STATUS CHART)

The screenshot displays the 'Your Leads settings' page. The main content area is titled 'Your Leads settings' and includes a description: 'Here you can change the Lead Status and Lead Source settings to improve the management of your leads.' Below this, there are three tabs: 'Status Chart', 'Source Chart', and 'Import Leads'. The 'Status Chart' tab is active, showing a table of lead statuses. The table has columns for 'Status', 'Description', 'User', and 'Office'. The statuses listed are: New Lead, To Be Appointed, Appointed, Worked, Preparing Quote, Quoted, Decision Pending, Sold, and Subject to Contract. Each status row includes a 'SETTINGS' button and up/down arrows. A '+ ADD STATUS' button is located at the bottom right of the table.

Status	Description	User	Office
New Lead	This is a new lead waiting to be actioned	-	-
To Be Appointed	An Appointment is being scheduled	-	-
Appointed	An Appointment has been made	-	-
Worked	An Appointment has taken place. Awaiting report	-	-
Preparing Quote	A Quote is being prepared	-	-
Quoted	Quote Delivered to customer	-	-
Decision Pending	Awaiting customer decision	-	-
Sold	Lead is now a sale.	-	-
Subject to Contract	Contract yet to be signed.	-	-

Statuses can be used to update and track the progress of each lead. Sources help you measure the performance of your marketing spend.

Add a new status:

- SELECT + ADD STATUS to set up a new lead status.
- Click STATUS NAME to label the status (e.g. To Be Appointed).
- Click DESCRIPTION to add more information (if required).
- Click SUB STATUS OF to assign the status to a group (e.g. Fresh).
- Click COLOUR to easily identify the new status. You may want to choose a colour to associate it with another status or to define it as a separate status.
- Add a DEFAULT USER if you want to always assign a status to one person (e.g. when the status is changed to 'Sold' it can automatically be assigned to the user in charge of order fulfilment and your Toolbox will automatically raise a Notification for them to progress it).
- Add a DEFAULT OFFICE if you want to always assign a status to one office (e.g. when the status is changed to 'To Be Appointed' it can automatically be assigned to all users in the Sales Office and your Toolbox will automatically raise a Notification for them to arrange an appointment).
- Click INSERT STATUS to select its position on the Status Chart.
- Select ADD STATUS to finish.

Select the green arrows to move a status up or down the Status Chart, so that you can group statuses together and in the right order.

To edit a status, click the "SETTINGS" button next to the status you want to change.

Add a source:

- Select + ADD SOURCE to set up a new lead source.
- Click SOURCE NAME to label the source.
- Click DESCRIPTION to add more information (if required).
- Click SUB SOURCE OF to assign the source to a group (e.g. you might assign The Express to your Newspaper group).
- Select ADD SOURCE to finish.

To edit a source, click the “SETTINGS” button next to the source you want to change. Delivery sources are automated and cannot be changed.

Generating Reports

You can use the “YOUR LEADS” tool to generate reports.

Select the REPORTS icon (far right top corner) and click the “GENERATE REPORT” button at the top of the right hand column.

Then select a date range and report type.

Click “GENERATE REPORT” to view the report.

9. Price Engine Builder

Use the Price Engine Builder to add the world's most powerful lead generating tool to your website and to configure and manage your products and prices.

There are 4 tabs in this tool:

Snap View - Allows you to quickly adjust the prices of all your products.

Products - Manage all the products in your Price Engine.

Price Engine Settings - Alter your main Price Engine settings (eg. currency).

Add to your website - Use this tab to send instructions to your web site designer.

Snap View (Fig 12)

You can adjust your prices instantly by moving the slider by each product. A sample is displayed below the slider so you can see the effect of your adjustments.

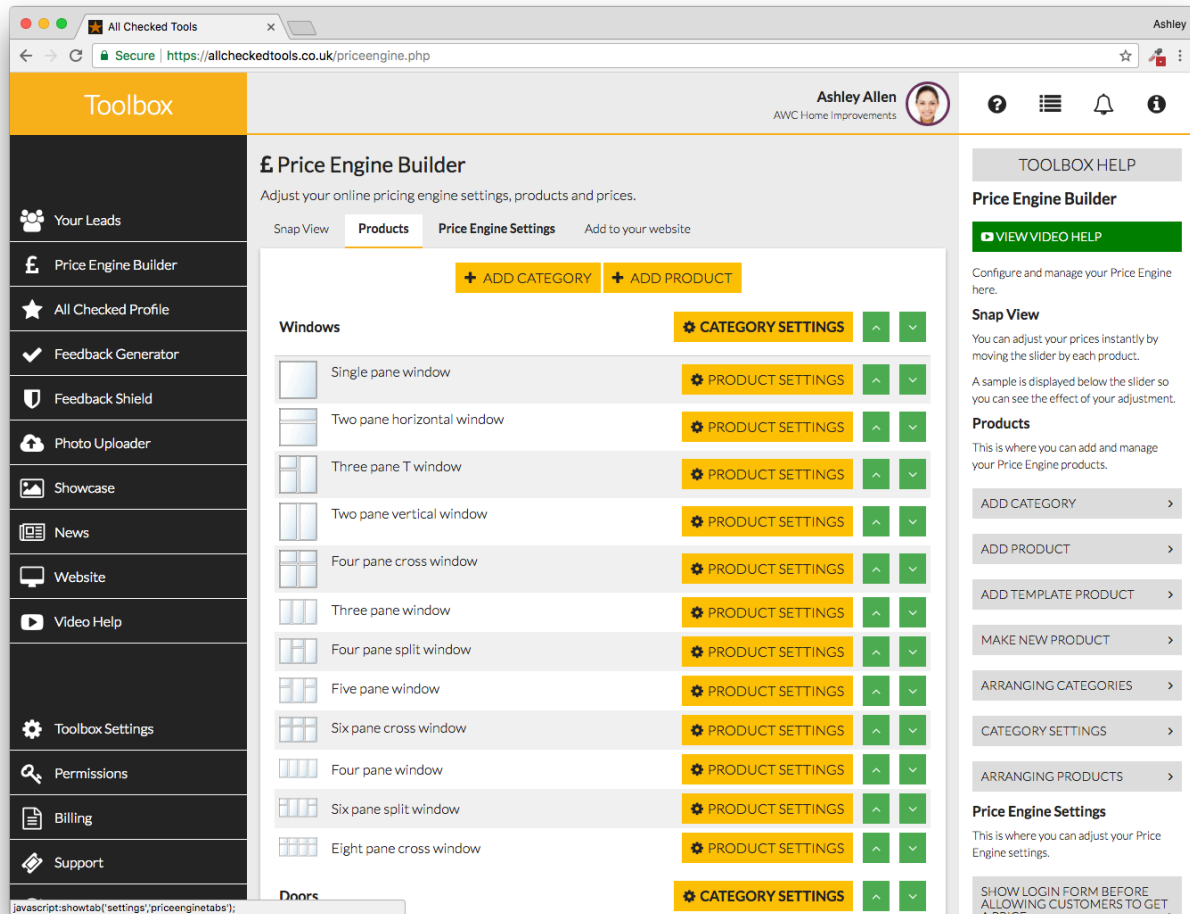
FIG 12. SNAP VIEW

The screenshot displays the 'Price Engine Builder' interface in 'Snap View' mode. The browser address bar shows the URL 'https://allcheckedtools.co.uk/priceengine.php'. The interface features a dark sidebar on the left with a 'Toolbox' header and various navigation options: 'Your Leads', 'Price Engine Builder', 'All Checked Profile', 'Feedback Generator', 'Feedback Shield', 'Photo Uploader', 'Showcase', 'News', 'Website', 'Video Help', 'Toolbox Settings', 'Permissions', 'Billing', 'Support', and 'Updates'. The main content area is titled '£ Price Engine Builder' and includes a sub-header 'Adjust your online pricing engine settings, products and prices.' Below this are four tabs: 'Snap View' (selected), 'Products', 'Price Engine Settings', and 'Add to your website'. The 'Snap View' tab contains a instruction 'Drag the sliders to change the prices.' and a list of window types with their respective sample prices and a 20% markup. The right sidebar contains a 'TOOLBOX HELP' section with links to 'Price Engine Builder' and 'VIEW VIDEO HELP', followed by sections for 'Snap View', 'Products', and 'Price Engine Settings'.

Window Type	Sample Price	Markup
Single pane window	£140.87	20%
Two pane horizontal window	£134.12	20%
Three pane T window	£114.01	20%
Two pane vertical window	£133.43	20%
Four pane cross window	£130.26	20%
Three pane window	£61.62	20%

Products (Fig 13)

FIG 13. PRODUCTS VIEW



Add a Category:

- Your PRICE ENGINE can price anything you like. Start by selecting the 'Products' tab and adding a category (e.g. windows, doors, garage conversions). Each new category will appear on your products list. You can add as many categories as you like.
- Select +ADD CATEGORY to add a product category.
- Click CATEGORY NAME to enter the name of your category (eg. Doors).
- Select ADD CATEGORY to finish

Add a product:

This is where you can add products to a category. New products will be displayed in the products list under the relevant category. If you want to create a new product simply select a template product and adjust the Product Settings to suit. (see Fig 14.)

- To add a product select the individual product from the drop down list and then select the category you want to attach it to.

- Then select ADD NEW PRODUCT to finish.
- To add all template products within a category select the category name from the drop down list and then select the category you want to attach it to.
- Then select ADD NEW PRODUCT TAB to finish.

Arranging Categories:

You can move categories up and down the Product List using the green arrows on the right of the Category Heading.

Category Settings:

- Select CATEGORY SETTINGS next to the Category Heading to change the category name.
- Click PRODUCT CATEGORY NAMES to enter the new name of the product category.
- Select SAVE to finish.

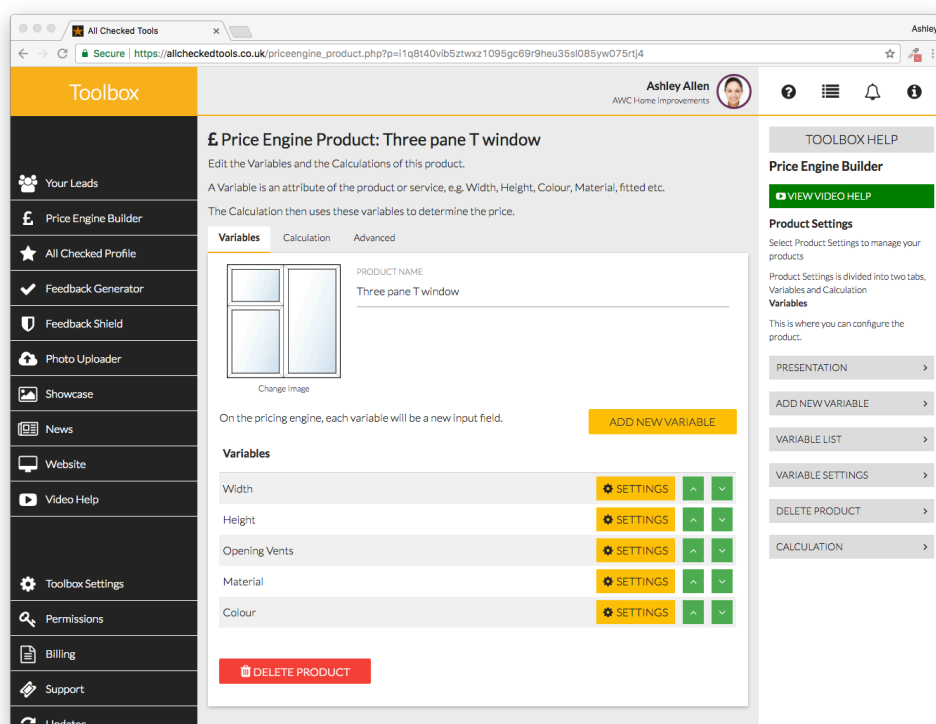
Arranging Products:

You can rearrange the products within a category using the green arrows on the right of each product.

Product Settings:

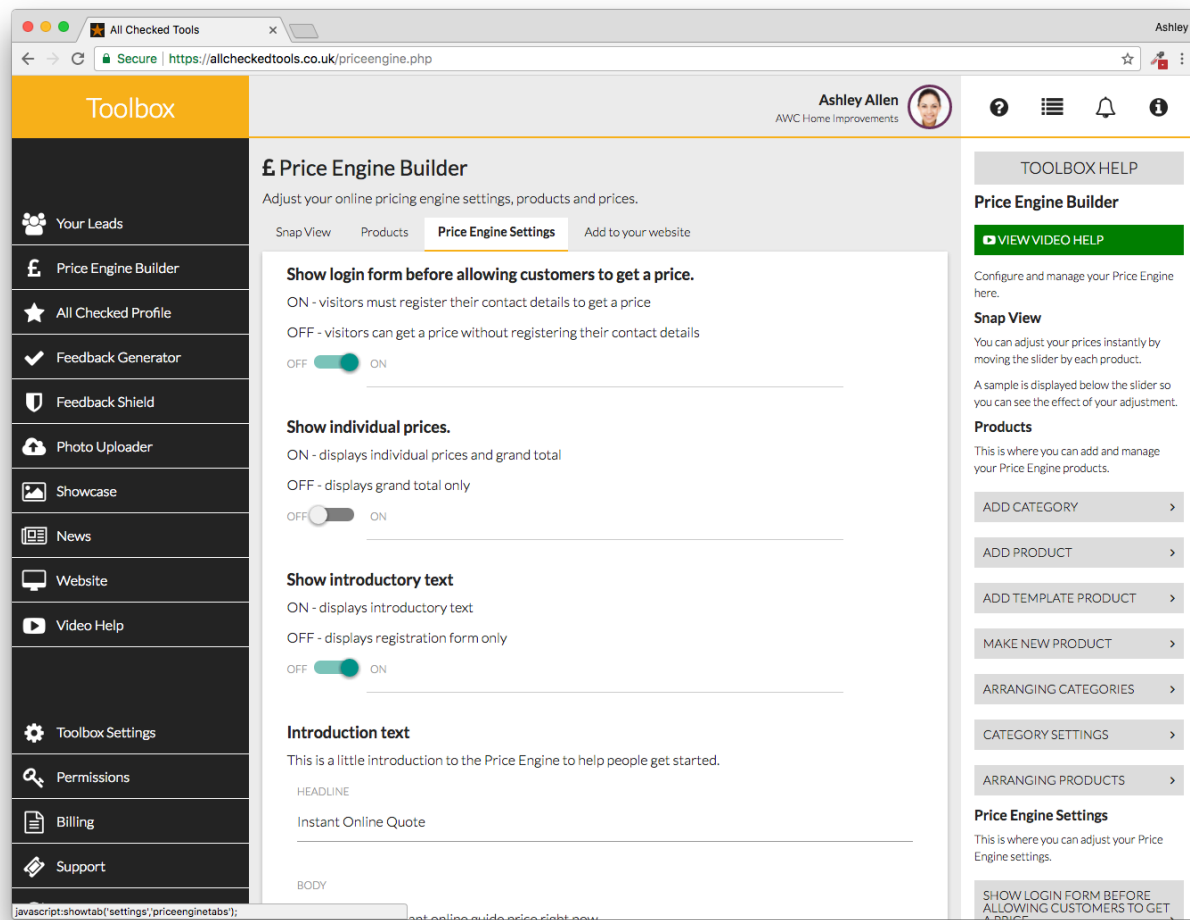
Select PRODUCT SETTINGS next to the product you'd like to edit. This will take you to the product's setting page (Fig 14), where you can edit all the various elements of the product and set individual pricing controls.

FIG 14. PRODUCTS



Price Engine Settings (Fig 15)

FIG 15. PRICE ENGINE SETTINGS



This is where you can adjust the following Price Engine settings:

SHOW LOG IN FORM BEFORE ALLOWING CUSTOMERS TO GET A PRICE:

If you turn this OFF website visitors will be able to get an online price without leaving their contact details. THIS MEANS YOU WON'T GET ANY LEADS!

SHOW INDIVIDUAL PRICES:

If you turn this OFF, individual product prices will no longer be displayed. Website visitors will only see the grand total.

SHOW INTRODUCTORY TEXT:

If you turn this OFF, website visitors will see the Price Engine registration form only. There will be no introductory text by the side of it.

INTRODUCTORY TEXT:

Click HEADLINE or BODY to edit the text by your Price Engine Registration Form.

REGISTRATION FORM TITLE:

Click SUBTITLE to change the subtitle of the Registration Form.

BUTTON TEXT

Click **BUTTON TEXT** to change the text of the link on the Registration Form.

PRICE BLUR:

You can set your Price Engine to show a price range instead of a fixed price. Simply enter the required % shift either side of the fixed price. For example: if you enter 10 and the fixed Price is £500, the Price Engine will display £450-£550 instead.

CURRENCY:

To change the currency select from the drop down list.

QUOTE PREPEND:

Quote prepend is the introduction to the price (e.g. 'We can supply and fit for' or 'Prices From' etc.). Click on **TEXT** to change the Quote Prepend.

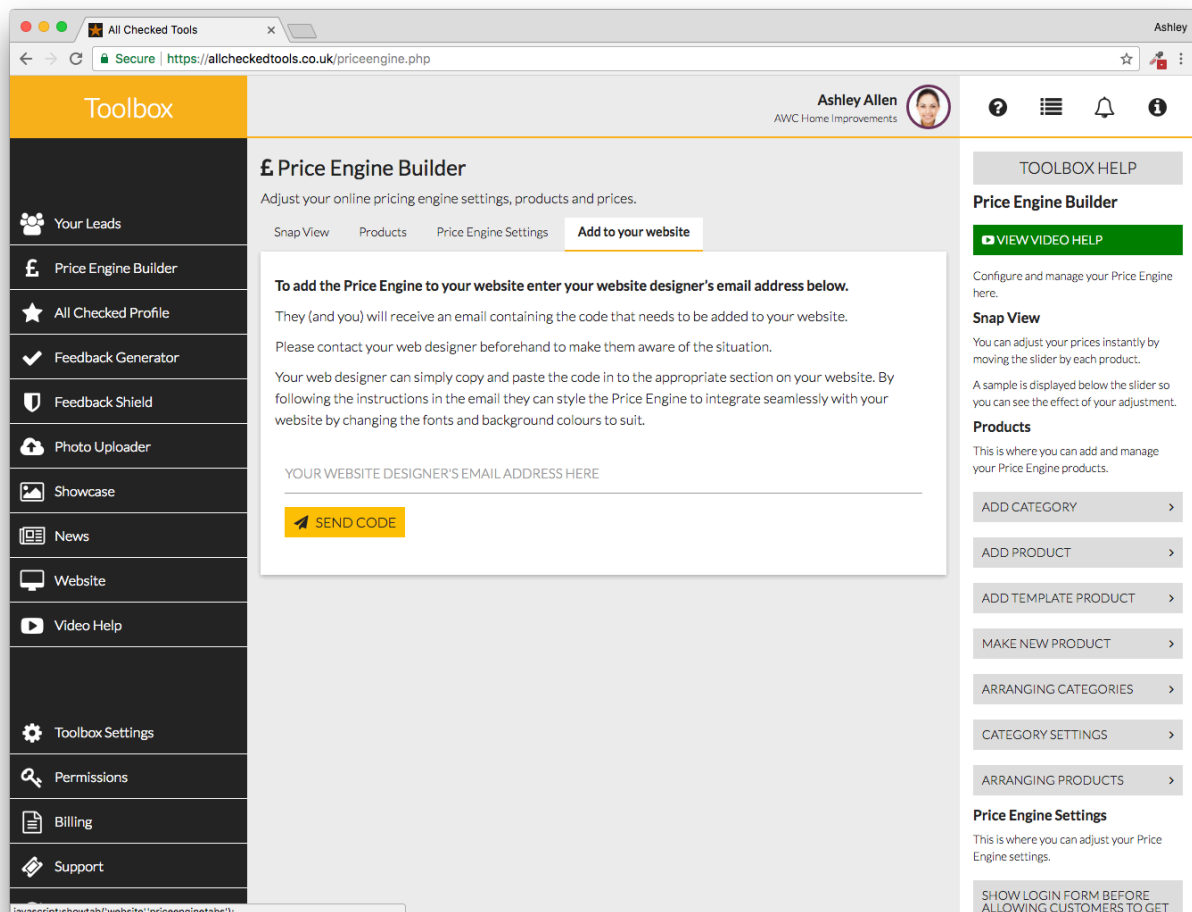
PURCHASE TAX:

Click on **TEXT** to change the purchase tax wording.

Add to your website (Fig 16)

Click on the **ENTER YOUR WEB DESIGNER'S EMAIL ADDRESS HERE** field to enter your web designer's email address. Select **SEND CODE** to send the code.

Fig 16. Add to your website

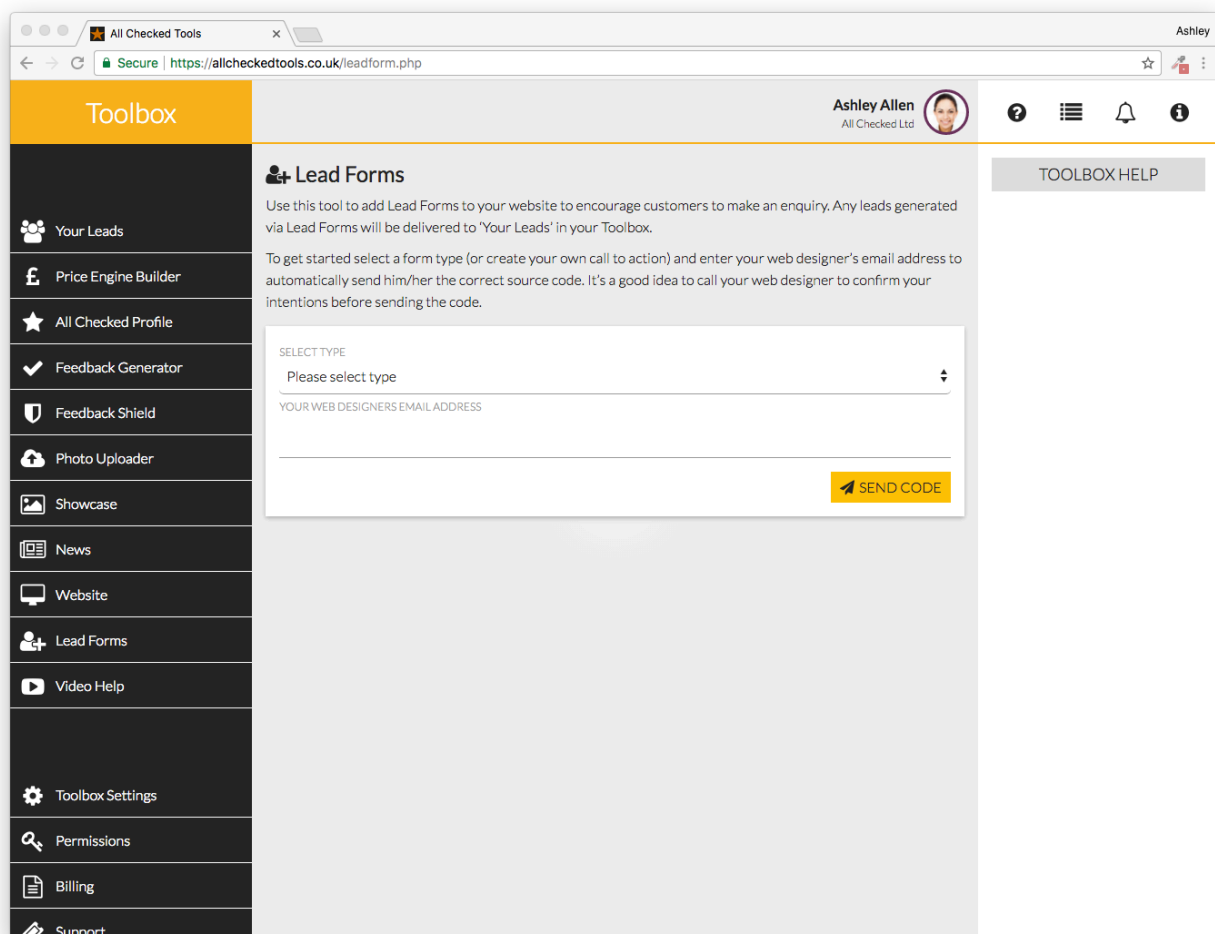


10. Lead Forms

Use this tool to add other lead generating forms to your website to encourage customers to make an enquiry. Any leads generated via Lead Forms will be delivered to “Your Leads” in your Toolbox.

To get started, select a form type (or create your own call to action) and enter your web designer’s email address to automatically send them the correct source code. (Fig 22)

FIG 22. LEAD FORMS



The screenshot shows a web browser window with the URL <https://allcheckedtools.co.uk/leadform.php>. The page is titled "Toolbox" and features a sidebar with various tools. The "Lead Forms" tool is selected, displaying instructions and a form to generate source code. The form includes a dropdown menu for "SELECT TYPE" and a text input for "YOUR WEB DESIGNERS EMAIL ADDRESS". A "SEND CODE" button is located at the bottom right of the form.

Toolbox

Lead Forms

Use this tool to add Lead Forms to your website to encourage customers to make an enquiry. Any leads generated via Lead Forms will be delivered to 'Your Leads' in your Toolbox.

To get started select a form type (or create your own call to action) and enter your web designer's email address to automatically send him/her the correct source code. It's a good idea to call your web designer to confirm your intentions before sending the code.

SELECT TYPE
Please select type

YOUR WEB DESIGNERS EMAIL ADDRESS

SEND CODE

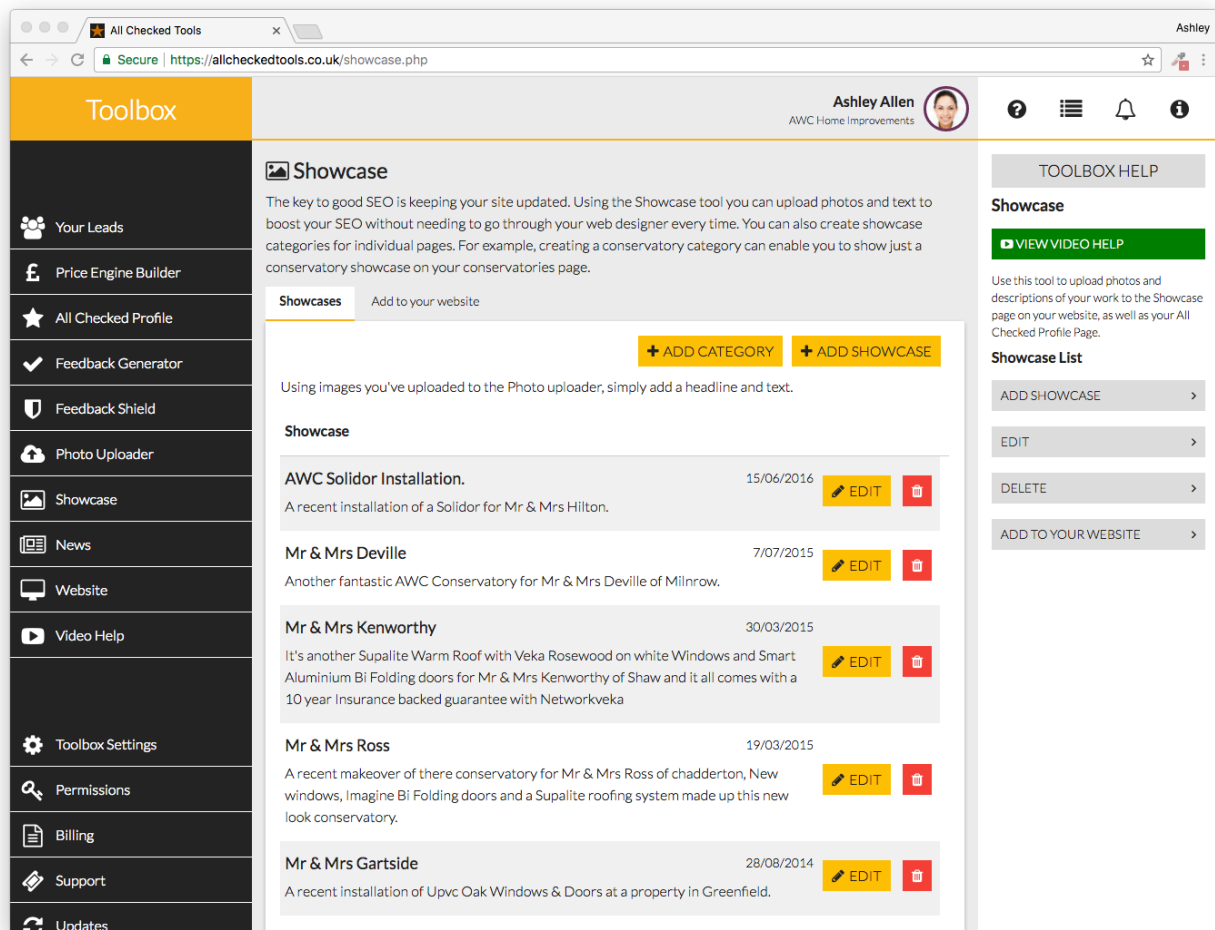
TOOLBOX HELP

**SEARCH
ENGINE
OPTIMISATION**

11. Showcase

Use this tool to upload photos and descriptions of your work to your website (Fig 20). This is a powerful SEO tool.

FIG 20. SHOWCASE



Add a showcase

- Select + ADD SHOWCASE to add a new Showcase Project.
- Click on the TITLE field to add a title to your Showcase Project.
- Click on the PROJECT DESCRIPTION field to enter a description of the work. (TIP: Try to use Products and location keywords to boost your SEO).
- Select the photo(s) from your library to display in your Showcase Project.
- Select ADD SHOWCASE to finish.

To edit or delete a showcase, click the “EDIT” or “DELETE” buttons next to the showcase you’d like to edit or delete.

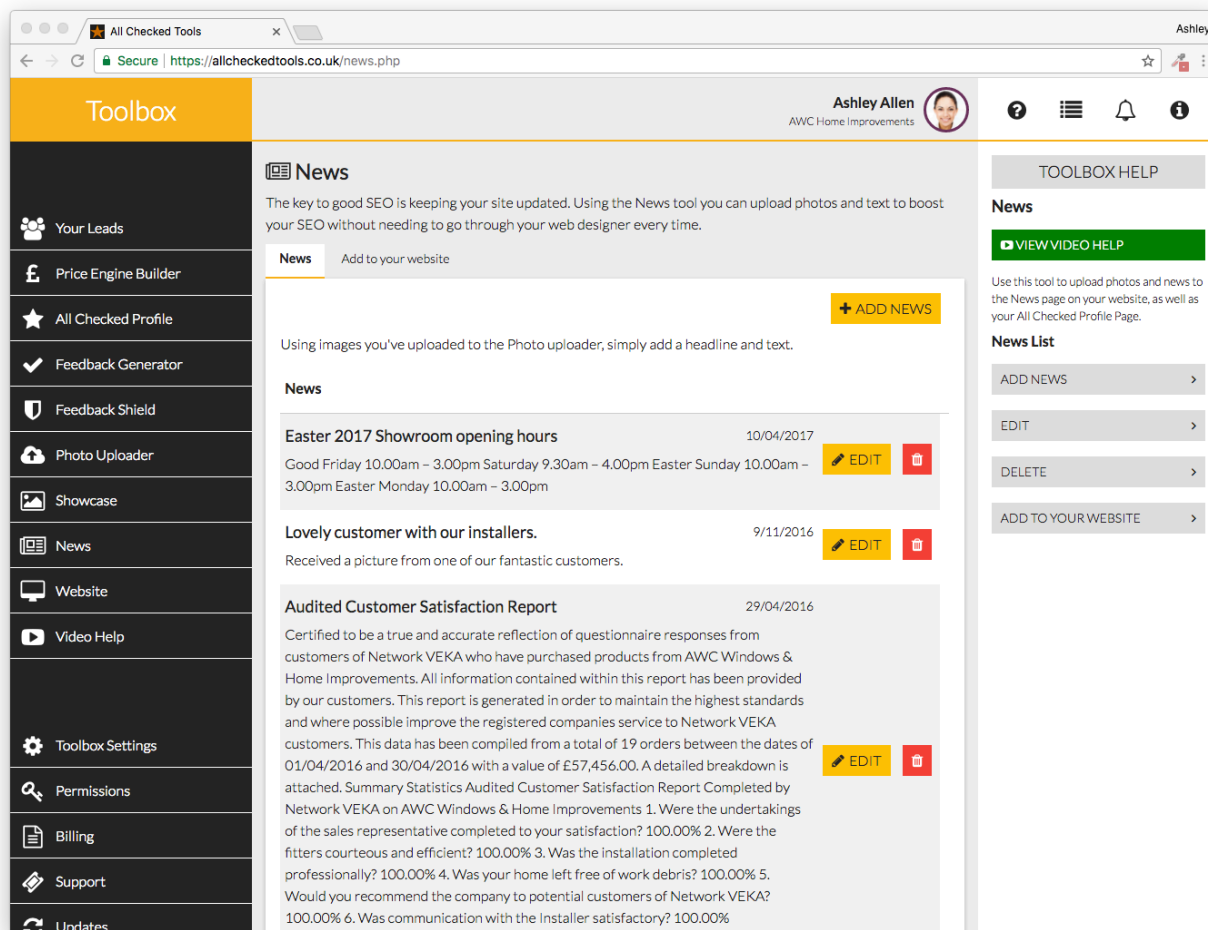
Add to your website

- Click on the ENTER YOUR WEB DESIGNER’S EMAIL ADDRESS HERE to enter your web designer’s email address.
- Select SEND CODE to send the code to your web designer so they can add the Showcase page to your website.

12. News

The key to good SEO is to keep your website updated.
Use this tool to instantly upload photos and news on to the News page of your website (Fig 21).

FIG 21. NEWS



Add news:

- Select + ADD NEWS to add photos and content to the News page on your website.
- Click on the HEADLINE field to add a title to your news story.
- Click on the ADD BODY field to enter the content.
- Select the photo(s) from your library (if required) to display on your News page.
- Select ADD NEWS to finish.

To edit or delete a news item, click the “EDIT” or “DELETE” buttons on next to the news item you’d like to edit or delete.

Add to your website

- Click on the ENTER YOUR WEB DESIGNER'S EMAIL ADDRESS HERE field to enter your web designer's email address.
- Select SEND CODE to send the code to your web designer so they can add the News page to your website.